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INTRODUCTION

Reports can be generated provide you with information about your agency's transactions. Two options are presented on the Reports screen: **Adjustment** and **Audit**. Audit reports are generated only in PDF format and will report the approval history of a document – for each adjustment transaction, the approver's names and approval levels that have been completed will be displayed.

GENERATING ADJUSTMENT REPORTS

1. Select and/or enter the criteria for which you want to generate a report.

Figure 1 - Reports screen

The screenshot shows the 'Reports' screen of the Adjustments User Manual. The interface includes a navigation bar with tabs for 'Status', 'Document', 'Attachment', 'Approval', and 'Reports'. The 'Reports' tab is currently selected. Below the navigation bar, there is a section titled 'Choose Report Criteria(s)'. This section contains several input fields: 'Status' (a dropdown menu), 'Batch Type' (a dropdown menu), 'Batch Date' (a text field with a calendar icon), 'Tran Code' (a dropdown menu), 'Index' (a dropdown menu), and 'PCA' (a dropdown menu). Below these fields is a box labeled 'Searchable Fields Use \"%\" for wildcards'. Inside this box are three rows of input fields: 'Doc' (text), 'Group' (text), 'Invoice #' (text), 'Vendor #' (text), and 'Sfx' (text). At the bottom of the screen, there are three buttons: 'PDF Report', 'TXT Report', and 'CSV Report', and a 'Reset' button on the right.

2. The report criteria include:

Selectable criteria	Searchable fields
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<ul style="list-style-type: none">• Status• Batch Type• Batch Date (the date transactions went to STARS)• Trans Code (transaction code)• Index• PCA	<p>(Use the percent symbol (%) as a wildcard in 'searchable' fields)</p> <ul style="list-style-type: none">• Doc - Document number• Invoice # - Invoice number• Group - Group name• Vendor # and Sfx – Vendor number and suffix
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Note the following:

- The **Status** menu will only display status for existing documents. If no documents exist for any given status (e.g., Released,) that status will not appear on the menu. If you have just changed the status of your documents, you may have to exit the application and open it again to refresh the Reports Status selection.
 - The transaction code (**Trans Code**), **Index**, or **PCA** will show only those codes that have been used on the Adjustments documents for your agency (it will not show all codes possible).
 - In the **Searchable Fields** section, you do not have to type the complete information. For example you only have to type the first few letters of a vendor name to get a report that finds all vendors beginning with what you have typed. You can also use the percent symbol (%) as a wildcard.
3. Click **PDF Report**, **TXT Report**, or **CSV Report**. Reports are then generated and displayed in the file format you select - PDF, text, or comma separated value (CSV) format. The reports can be saved to your computer.